

1. Make sure your Parameters include “**Percentage: 80**” and “***Run Type: Vacation**”
2. Change the “**As of Date**” and “**Business Unit**” per your request. If you want to narrow down your search by Department, you may also enter a value in the “**Department**” field.
3. Checkbox “**Create report**” and “**Create merge file:**”. Name your file accordingly and be sure to follow the file name with “.dat”.
 - a. For example: <<MailMerge.dat>>

The screenshot shows the PeopleSoft interface for configuring a report. The title bar at the top reads "PeopleSoft". Below it, a tab labeled "Run Parameters" is active. The "Run Control ID:" is "LeaveAccrualLimitRpt". To the right are links for "Report Manager" and "Process Monitor", and a "Run" button. The "Report Request Parameters" section contains several fields: "As Of Date:" with a date picker set to 10/18/2005, "Business Unit:" with a dropdown set to A1240, "Department:" with an empty dropdown, and "Leave Plan:" with an empty dropdown. To the right of these is a red-bordered box containing "Percentage:" set to 80 and "*Run Type" set to Vacation. Below these is the text "Auditor & Controller". A green-bordered box contains two checked checkboxes: "Create report" and "Create merge file:", followed by a text field containing "MailMerge.dat". On the left, the "File Name:" label is visible. At the bottom, there are buttons for "Save", "Return to Search", "Notify", "Add", and "Update/Display".

4. Click the “Run” tab. This will lead you to the Process Server Request page.
5. Make sure this page includes the following: “**Server Name: PSUNX**”; “***Type: Web**” and “***Format: PDF**”, then click “**Ok**”. You will return to the Run Parameters page.

PeopleSoft. Home

Process Scheduler Request

User ID: 025695 Run Control ID: LeaveAccrualLimitRpt

Server Name: PSUNX Run Date: 10/18/2005 31

Recurrence: Run Time: 11:44:55AM Reset to Current Date/Time

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Leave Accrual Limit Report	SDPY0901	SQR Report	Web	PDF	Distribution

OK Cancel

6. Click "Process Monitor". This will lead you to the Process List.
7. When the report status is **Successful** and **Posted**, click the "Details" link.

PeopleSoft. Home

Process List Server List

View Process Request For

User ID: 025695 Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status: ☒ Save On Refresh

Process List Customize | Find | View All | First 1-23 of 23 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	35433		SQR Report	SDPY0901	025695	10/18/2005 11:44:55AM PDT	Success	Posted	Details
<input type="checkbox"/>	35431		SQR Report	SDPY0901	025695	10/18/2005 11:33:45AM PDT	Success	Posted	Details
<input type="checkbox"/>	35430		SQR Report	SDPY0901	025695	10/18/2005 11:33:00AM PDT	Success	Posted	Details
<input type="checkbox"/>	35426		SQR Report	SDPY0901	025695	10/18/2005 11:10:39AM PDT	Success	Posted	Details

8. Click the "View Log/Trace" link.

Process Detail

Process

Instance: 35433 **Type:** SQR Report
Name: SDPY0901 **Description:** Leave Accrual Limit Report
Run Status: Success **Distribution Status:** Posted

Run

Run Control ID: LeaveAccrualLimitRpt

Location: Server

Server: PSUNX

Recurrence:

Update Process

- ☒ Hold Request
- ☒ Queue Request
- ☒ Cancel Request
- ☐ Delete Request
- ☒ Restart Request

Date/Time

Request Created On: 10/18/2005 11:51:05AM PDT
Run Anytime After: 10/18/2005 11:44:55AM PDT
Began Process At: 10/18/2005 11:51:08AM PDT
Ended Process At: 10/18/2005 11:51:13AM PDT

Actions

[Parameters](#) Transfer
[Message Log](#)
Batch Timings
[View Log/Trace](#)

OK

Cancel

9. Open the ".dat" file.

View Log/Trace

Report

Report ID: 22677 **Process Instance:** 35433 [Message Log](#)
Name: SDPY0901 **Process Type:** SQR Report
Run Status: Success

Leave Accrual Limit Report

Distribution Details

Distribution Node: FTPNT **Expiration Date:** 11/08/2005

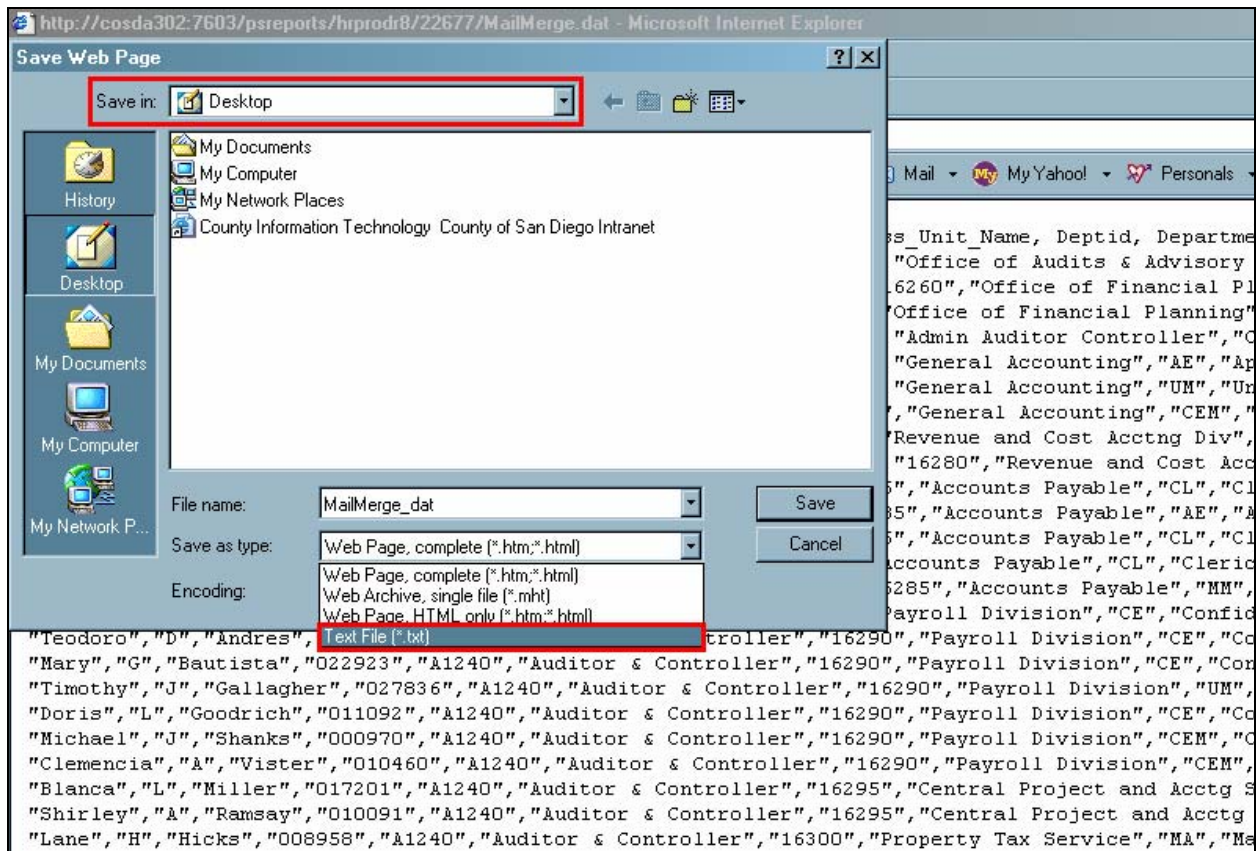
File List

Name	File Size (bytes)	Datetime Created
MailMerge.dat	12,346	10/18/2005 11:51:13.000000AM PDT
Message Log	1,739	10/18/2005 11:51:13.000000AM PDT
sdpy0901_35433.PDF	18,400	10/18/2005 11:51:13.000000AM PDT
Trace File	628	10/18/2005 11:51:13.000000AM PDT

Distribute To

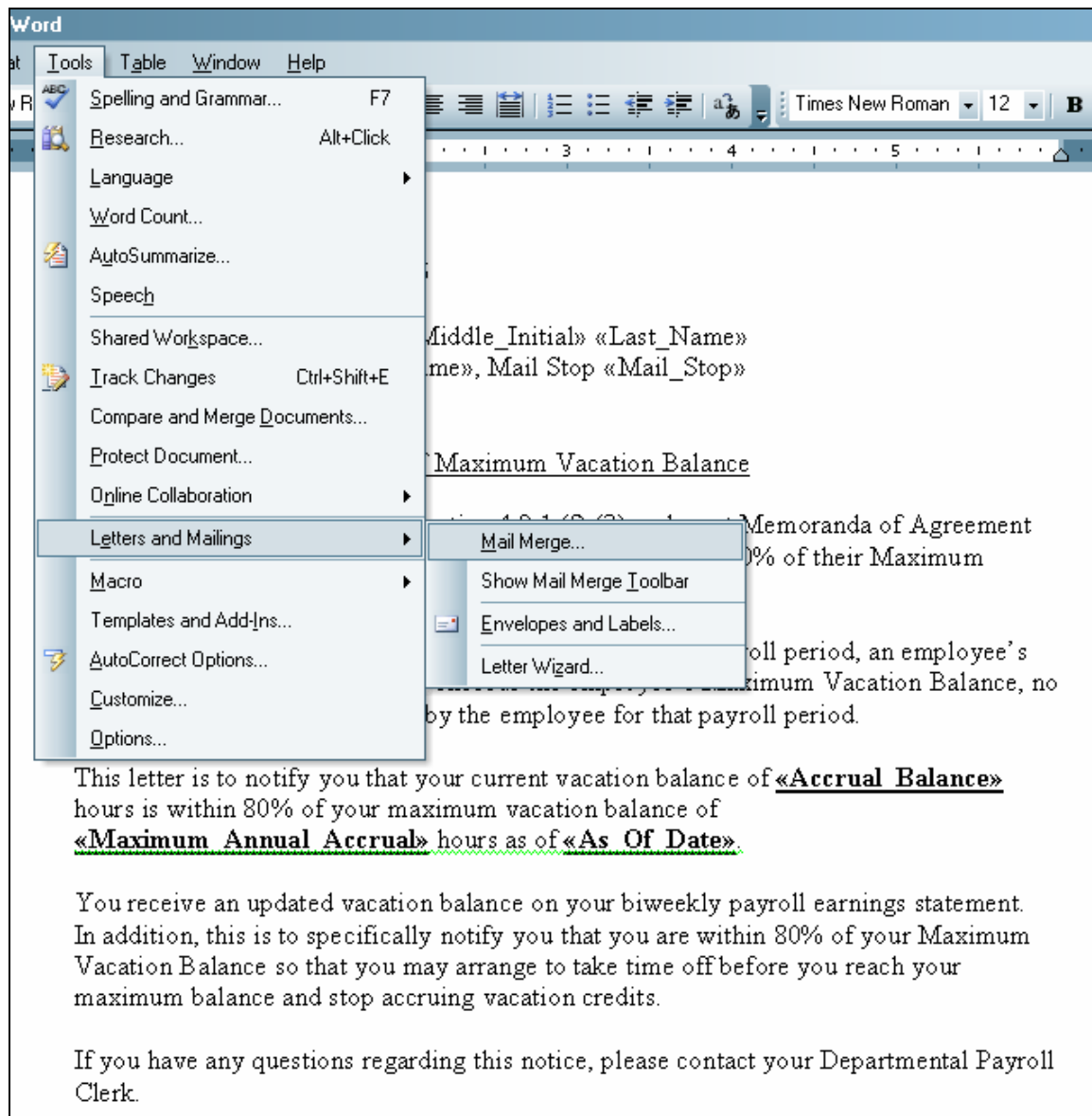
Distribution ID Type	*Distribution ID
User	025695

10. Save this file on your **desktop** (or any accessible folder), making sure to save it as a **“text file (*.txt)”**.



11. Now, open the generic Maximum Vacation Balance letter template <<file name: MaxVacLetter.doc>> in MSWord.

12. Click on “Tools”, then “Letters and Mailings”, then “Mail Merge”



Step 1: A menu on the right-hand side will open. Select “**Letters**” under “Select document type”. Then click “**Next**” at the bottom of the page.

The screenshot shows a document window on the left with placeholder text like «Middle_Initial» «Last_Name» and «Mail_Stop». On the right, the 'Mail Merge' dialog box is open to the 'Select document type' step. The 'Letters' radio button is selected. Below the list, there is a 'Letters' section with instructions. At the bottom, a 'Next: Starting document' button is highlighted with a red box.

Select document type

What type of document are you working on?

- ☒ Letters
- ☐ E-mail messages
- ☐ Envelopes
- ☐ Labels
- ☐ Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.

Step 1 of 6

Next: Starting document

This screenshot shows the 'Select starting document' step of the Mail Merge wizard. The 'Use the current document' radio button is selected. Below the options, there is a section titled 'Use the current document' with explanatory text.

Select starting document

How do you want to set up your letters?

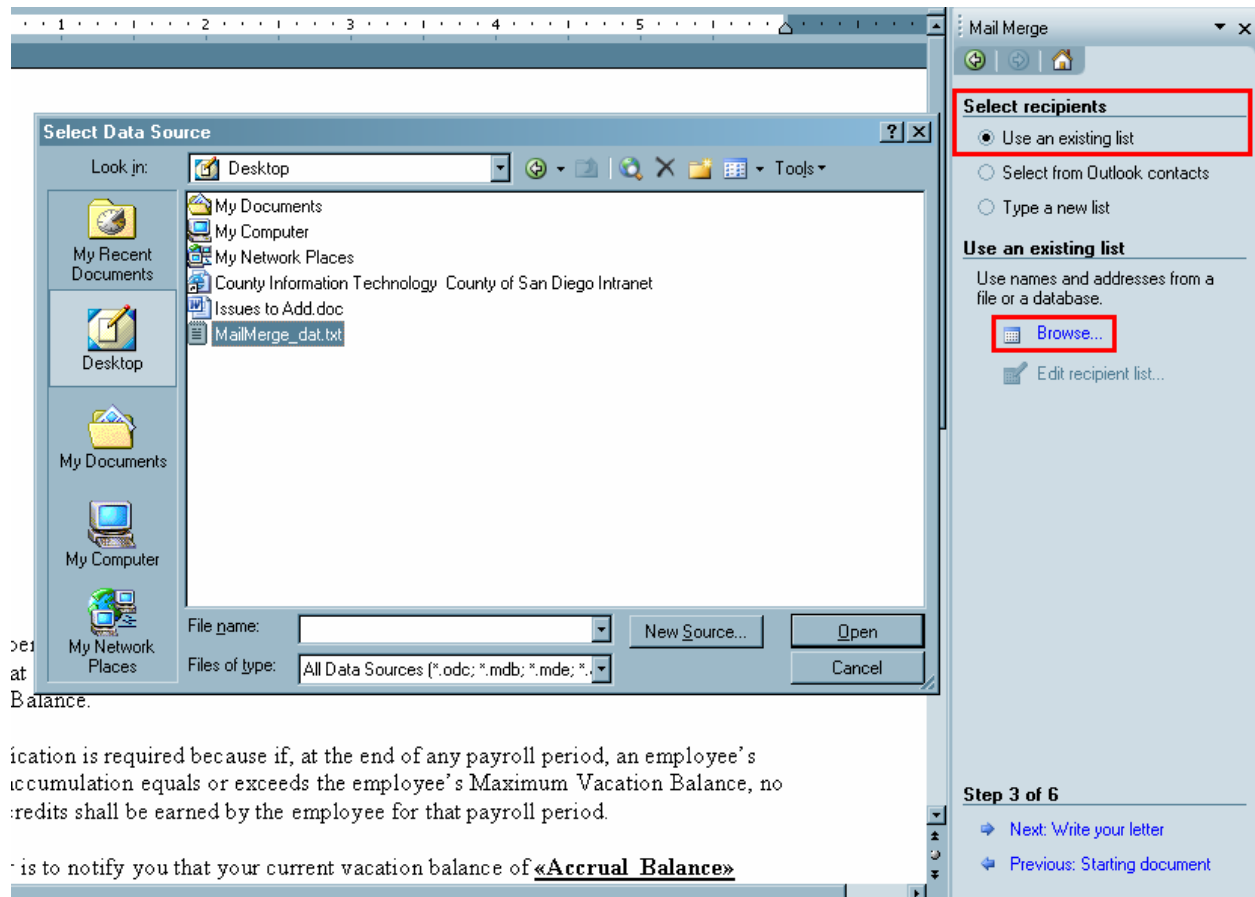
- ☒ Use the current document
- ☐ Start from a template
- ☐ Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2: Under “Select starting document,” select “**Use the current document**” and click “**Next**” at the bottom of the page.

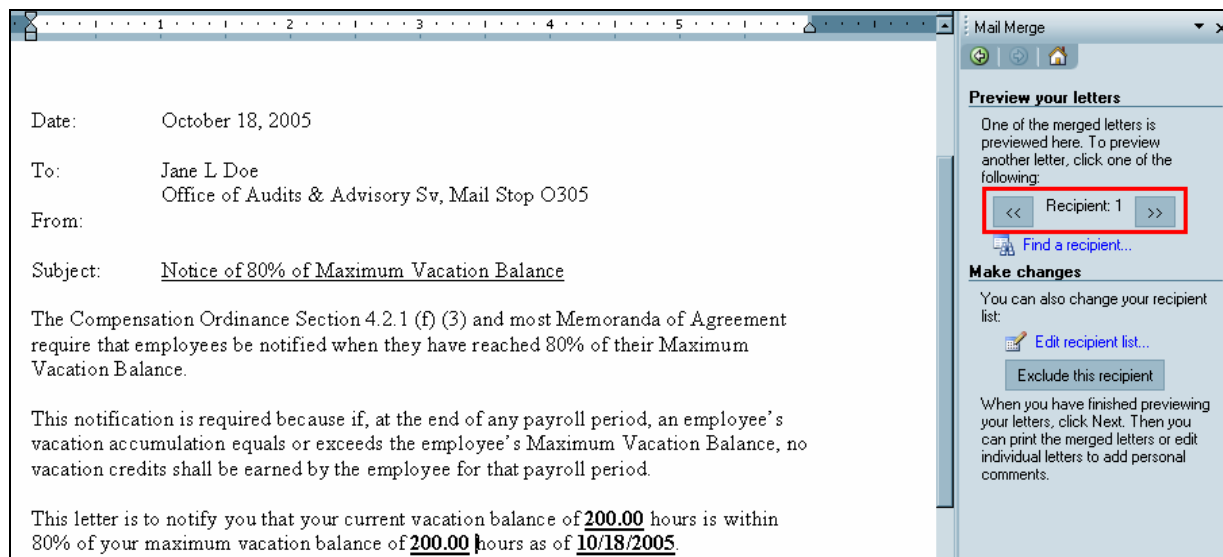
Step 3: Under “Select recipients” select “**Use an existing list**”, then click “**Browse**”. Find the .dat file, saved as a text, from before. The file in this sample was saved as <<MailMerge_dat.txt>>.



A new tab, titled “Mail Merge Recipients”, will open with the employees’ data. Verify that this is the correct data. If so, click “Ok”. If not, edit the list or select a different file. Then, click “Next”.

Step 4: The right-hand menu will now read “Write your letter”. Within this menu you may insert more fields into the letter. Click “Next”.

Step 5: Now, the Maximum Vacation Balance letter template should be filled with the necessary data from the .txt file. Each employee will be listed separately on different pages. It is possible to preview each individual letter by clicking the arrows under “Preview your letters” in the menu bar. Click “Next”.



Step 6: The right-hand menu will now read "Complete the merge". Within this menu you may Print or Edit (personalize) the letters.